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Clinical Analytics

- Executive support for clinical analytics projects: 81%
- Clinical analytics at the enterprise level: 70%
- Quality scores delivered to clinical leaders: 70%
- Enterprise-level governance for clinical analytics: 67%
- Clinical analytics at the departmental level: 64%

Disease Registries

- Participate and actively exchange data in at least one HIE/RHIO*: 40%
- Have the electronic framework to participate, but not participating in any HIE/RHIO at this time: 30%
- Do not have the electronic framework to participate, and not participating in any HIE/RHIO at this time: 18%
- Do not have the electronic framework to participate, and not participating in any HIE/RHIO at this time, but plan to do so in the next year: 11%

* HIE/RHIO: Health Information Exchange/Regional Health Information Organization

13.7 ACO Management Of Pharmaceuticals

The National Pharmaceutical Council (www.nationalpharmaceuticalcouncil.org) reported the following percentages of ACOs with capabilities for management of pharmaceuticals:

- Transmit prescriptions electronically: 70%
- View prescription and medical data in one system: 54%
- Formularies encourage appropriate generic medication use: 50%
- Identify potential drug-drug or drug-disease or polypharmacy concerns: 43%
- Visit summaries list of all medications, potential adverse reactions and clear directions for use: 41%
- Formularies synchronized across different care sites: 35%
- Alert providers of preventive care gaps: 28%
- Use quality metrics for a diversity of conditions: 22%
- Pharmacists are involved in direct patient care: 22%
- Notify care providers when medication is prescribed: 20%
- Employ protocols to avoid duplicate medications/polypharmacy: 17%
- Capture patient reported outcomes electronically: 15%
- Share potential drug-drug or drug-disease or polypharmacy concerns with the care team: 13%
- Educate patients about alternatives/implications when determining the recommended medication care plan: 11%
- Notify care providers when medication is filled: 9%
- Quantify medication care offsets: 7%

13.8 Market Resources

Leavitt Partners, 299 South Main Street, Suite 2300, Salt Lake City, UT 84111.
(801) 538-5082. (www.leavittpartners.com)

National Association of ACOs, 601 13th Street NW, Suite 900 South, Washington, DC
20005. (202) 640-1985. (www.naacos.com)

14

AMBULATORY SURGERY CENTERS

14.1 Overview

Ambulatory Surgery Centers (ASCs) compete with hospital outpatient departments for procedures that don't require overnight stays, like colonoscopies and some joint surgeries. The average ASC is 15,262 square feet and has four operating rooms.

Sixty-four percent (64%) of ASCs are physician-owned and another 29% are partly owned by physicians, many in partnership with hospitals.

From the early 1980s to present, the share of outpatient surgeries performed in hospitals has declined from more than 90% to 45% as the result of ASCs.

There was rapid growth in ambulatory surgery centers from 1996 through 2005; more recent growth has been moderate.

14.2 ASC Census

At year-end 2017, there were 5,499 Medicare-certified freestanding ambulatory surgery centers in the United States, according to the Ambulatory Surgery Center Association (ASCA, www.ascassociation.org).

The number of ambulatory surgery centers by state are as follows:

• Alabama:	35	• Kentucky:	33
• Alaska:	15	• Louisiana:	81
• Arizona:	174	• Maine:	16
• Arkansas:	60	• Maryland:	345
• California:	794	• Massachusetts:	56
• Colorado:	122	• Michigan:	99
• Connecticut:	48	• Minnesota:	69
• Delaware:	23	• Mississippi:	69
• District of Columbia:	3	• Missouri:	95
• Florida:	417	• Montana:	17
• Georgia:	339	• Nebraska:	47
• Hawaii:	21	• Nevada:	69
• Idaho:	52	• New Hampshire:	26
• Illinois:	122	• New Jersey:	269
• Indiana:	125	• New Mexico:	18
• Iowa:	24	• New York:	134
• Kansas:	63	• North Carolina:	104

• North Dakota:	11	• Texas:	366
• Ohio:	186	• Utah:	41
• Oklahoma:	42	• Vermont:	1
• Oregon:	86	• Virginia:	52
• Pennsylvania:	234	• Washington:	194
• Rhode Island:	10	• West Virginia:	10
• South Carolina:	67	• Wisconsin:	77
• South Dakota:	19	• Wyoming:	18
• Tennessee:	136		

14.3 Market Assessment

Ambulatory surgery center gross charges in 2017 were approximately \$12 billion.

The payer mix as a percent of ASC gross charges was as follows (source:

VMG Health):

• Commercial:	59%
• Medicare:	29%
• Worker's compensation:	9%
• Medicaid:	7%
• Self pay:	4%
• Other pay:	5%

Net revenue per case at ASCs for various procedures was as follows (source:

VMG Health):

• Orthopedic procedures:	\$3,222
• ENT:	\$2,492
• Urology:	\$2,394
• Podiatry:	\$2,339
• OB/GYN:	\$2,271
• General surgery:	\$2,051
• Plastic:	\$1,801
• Ophthalmology:	\$1,395
• Oral surgery:	\$1,355
• Pain management:	\$1,015
• Gastroenterology:	\$ 973

14.4 Market Leaders

The following ASC management companies operate the most centers (source: ASCA):

• United Surgical Partners International/Tenet:	450
• AmSurg:	260
• Surgical Care Affiliates:	205
• Hospital Corporation of America:	117

- SurgCenter Development: 107
- Surgery Partners: 96

Ranked by total number of annual procedures, the following are the largest ambulatory surgery centers (source: *Modern Healthcare*):

• AtlantiCare Surgery Center (www.atlanticare.org):	19,153
• Northwest Michigan Surgery Center (www.northwestmichigansurgerycenter.com):	17,954
• Stony Point Surgery Center (www.stonypointsc.com):	16,010
• Lakeview Surgery Center (www.lakeviewsurgerycenter.com):	12,398
• Allied Physicians Surgery Center (www.apsurgery.com):	11,711
• Seattle Orthopedic Center (www.proliancesurgeons.com):	11,611
• Evansville Surgery Center (www.evansvillesurgerycenter.com):	10,748
• St. Cloud Surgical Center (www.stcsurgicalcenter.com):	10,070
• Prohance Highlands Surgery Center (www.proliancesurgeons.com):	8,924
• Village SurgiCenter (www.vscerie.com):	6,948
• Gulf Coast Endoscopy Center of Venice (www.gulfcoastendocenter.com):	6,879
• Edmonds Center for Outpatient Surgery (www.proliancesurgeons.com):	6,667
• Orthopaedic Center at Springhill (www.alortho.com/ambulatory.php):	6,190
• Valley Orthopedic Associates Ambulatory Surgery Center (www.proliancesurgeons.com):	6,155
• Southgate Surgery Center (www.southgatesurgery.com):	5,184
• Murdock Ambulatory Surgery Center (www.murdocksurgerycenter.com):	4,932
• Lakewood Surgery Center (www.proliancesurgeons.com):	3,808
• Evergreen Orthopedic Surgery Center (www.proliancesurgeons.com):	3,642
• Seashore Surgical Institute (www.seashoresurgical.com):	3,551
• Parkridge Surgery Center (www.palmettohealth.org):	3,372
• Everett Bone and Joint Surgery Center (www.proliancesurgeons.com):	3,236
• Central Minnesota Surgical Center (www.cmsurg.com):	3,217
• Surgery Center at Rainier (www.proliancesurgeons.com):	3,142
• Summit View Surgery Center (www.summitviewsc.com):	2,972

14.5 Procedures

According to *Modern Healthcare*, ambulatory surgery centers perform 2.7 million procedures annually, or 860.7 per 100,000 population.

The number of procedures by state are as follows:

	# Procedures	Procedures per 100,000
• Alabama:	51,653	1,072
• Alaska:	3,255	446
• Arizona:	70,583	1,077
• Arkansas:	38,326	1,299

• California:	231,318	609
• Colorado:	42,569	820
• Connecticut:	22,291	621
• Delaware:	15,651	1,703
• District of Columbia:	728	115
• Florida:	306,076	1,584
• Georgia:	100,619	1,015
• Hawaii:	5,375	387
• Idaho:	16,779	1,052
• Illinois:	81,559	634
• Indiana:	70,300	1,075
• Iowa:	15,959	519
• Kansas:	35,112	1,217
• Kentucky:	39,251	896
• Louisiana:	50,590	1,099
• Maine:	9,046	681
• Maryland:	95,401	1,621
• Massachusetts:	52,050	783
• Michigan:	69,094	699
• Minnesota:	18,369	342
• Mississippi:	57,970	1,941
• Missouri:	57,050	947
• Montana:	9,937	998
• Nebraska:	21,918	1,181
• Nevada:	27,498	998
• New Hampshire:	12,860	973
• New Jersey:	104,747	1,181
• New Mexico:	12,678	609
• New York:	67,206	343
• North Carolina:	73,402	753
• North Dakota:	6,647	948
• Ohio:	89,530	775
• Oklahoma:	31,124	816
• Oregon:	27,529	706
• Pennsylvania:	112,756	883
• Rhode Island:	5,069	483
• South Carolina:	70,312	1,489
• South Dakota:	7,929	951
• Tennessee:	91,618	1,415
• Texas:	196,932	756
• Utah:	13,553	475
• Vermont:	1,165	186
• Virginia:	51,893	634
• Washington:	61,712	895